

Claims

What is claimed is:

1. A computer based method for automatically creating a list of financing documents for a transaction, the method including the steps of:
requesting a decision criteria document;
preparing the decision criteria document, the decision criteria document having a plurality of data fields to be completed;
receiving completed data fields; and,
automatically selecting a required set of documents based on the completed data fields and preparing the list of financing documents.
2. A computer based method, as set forth in claim 1, including the steps of:
requesting initial information; and,
receiving the initial information; wherein the data fields of the decision criteria document are determined as a function of the initial information.
3. A computer based method, as set forth in claim 2, including the step of inserting transaction information by a user, wherein the initial information is automatically determined from the transaction information.
4. A computer based method, as set forth in claim 2, wherein the initial information includes a contract type, a country code, and a lessor number.
5. A computer based method, as set forth in claim 4, wherein the contract type is one of a lease, a loan, an installment contract, and a governmental lease.

6. A computer based method, as set forth in claim 1, wherein the decision criteria document is in extended markup language.

7. A computer based method, as set forth in claim 1, including the step of allowing a user to override the required set of documents.

8. A computer based method, as set forth in claim 1, wherein the required set of documents includes a primary document and at least one supporting document.

9. A computer based method, as set forth in claim 1, wherein each document in the list of financing documents includes a document name, a number of copies, and a simplex/duplex code.

10. A computer based method, as set forth in claim 1, including the step providing a list of the required set of documents to a user.

11. A computer based method, as set forth in claim 1, including the step of providing the required set of documents.

12. A computer based method for automatically creating a list of financing documents for a transaction, the method including the steps of:

inserting transaction information by a user;

requesting a decision criteria document;

requesting initial information in response to the request for a decision criteria document;

determining the initial information from the transaction information;

preparing the decision criteria document, the decision criteria document having a plurality of data fields as a function of the initial information;

receiving completed data fields; and,

automatically selecting a required set of documents based on the completed data fields and preparing the list of financing documents.

13. A computer based method, as set forth in claim 12, including the step of providing a graphical user interface for interaction with the user.

14. A computer based method, as set forth in claim 12, wherein the initial information includes a contract type, a country code, and a lessor number.

15. A computer based method, as set forth in claim 14, wherein the contract type is one of a lease, a loan, an installment contract, and a governmental lease.

16. A computer based method, as set forth in claim 12, wherein the decision criteria document is in extended markup language.

17. A computer based method, as set forth in claim 12, including the step of allowing the user to override the required set of documents.

18. A computer based method, as set forth in claim 12, wherein the list of financing documents includes a primary document and at least one supporting document.

19. A computer based method, as set forth in claim 12, wherein each document in the required set of documents includes a document name, a number of copies, and a simplex/duplex code.

20. A computer based method, as set forth in claim 12, including the step providing a list of the required set of documents to the user.

21. A computer based method, as set forth in claim 12, including the step of providing the required set of documents.

22. A computer based system for automatically creating a list of financing documents for a transaction, comprising:
a finance computer application located at a first location; and,
an auto-packaging computer application coupled to the finance computer application and being located at a second location, the auto-packaging computer application being adapted to receive a request for a decision criteria document from the finance computer application and prepare the decision criteria document, the decision criteria document having a plurality of data fields to be completed, to receive completed data fields from the finance computer application, and to automatically select a required set of documents based on the completed data fields and preparing the list of financing documents.

23. A computer based system, as set forth in claim 22, wherein the auto-packaging computer application is adapted to request initial information from the finance computer application in response to receiving the request for a decision criteria document and to receive the initial information from the finance computer application, wherein the data fields of the decision criteria document are determined as a function of the initial information.

24. A computer based system, as set forth in claim 24, wherein the finance computer application is adapted to receive transaction information from a user, wherein the initial information is determined from the transaction information.

25. A computer based system, as set forth in claim 23, wherein the initial information includes a contract type, a country code, and a lessor number.

26. A computer based system, as set forth in claim 25, wherein the contract type is one of a lease, a loan, an installment contract, and a governmental lease.

27. A computer based system, as set forth in claim 22, wherein the decision criteria document is in extended markup language.

28. A computer based system, as set forth in claim 22, wherein the finance computer application is adapted to allow the user to override the required set of documents.

29. A computer based system, as set forth in claim 22, wherein the required set of documents includes a primary document and at least one supporting document.

30. A computer based system, as set forth in claim 22, wherein each document in the list of financing documents includes a document name, a number of copies, and a simplex/duplex code.

31. A computer based system, as set forth in claim 22, including a remote documents computer application, wherein the finance computer application is adapted to send the list of finance documents to the remote documents computer application and the remote documents computer application is adapted to responsively provide the required set of documents.

32. A computer based system for automatically creating a list of financing documents, comprising:

a finance computer application located at a first location, the finance computer application being adapted to be operated by a user;

an auto-packaging computer application coupled to the finance computer application and being located at a second location, the auto-packaging

computer application being adapted to receive a request for a decision criteria document from the finance computer application and prepare the decision criteria document, the decision criteria document having a plurality of data fields to be completed, to receive completed data fields from the finance computer application, and to automatically select a required set of documents based on the completed data fields and preparing the list of financing documents; and,

a graphical user interface implemented on the finance computer application for interaction with the user.

33. A computer based system, as set forth in claim 32, wherein the auto-packaging computer application is adapted to request initial information from the finance computer application in response to receiving the request for a decision criteria document and to receive the initial information from the finance computer application, wherein the data fields of the decision criteria document are determined as a function of the initial information.

34. A computer based system, as set forth in claim 33, wherein the finance computer application is adapted to receive transaction information from the user, wherein the initial information is determined from the transaction information.

35. A computer based system, as set forth in claim 33, wherein the initial information includes a contract type, a country code, and a lessor number.

36. A computer based system, as set forth in claim 35, wherein the contract type is one of a lease, a loan, an installment contract, and a governmental lease.

37. A computer based system, as set forth in claim 32, wherein the decision criteria document is in extended markup language.

38. A computer based system, as set forth in claim 32, wherein the finance application is adapted to allow the user to override the required set of documents.

39. A computer based system, as set forth in claim 32, wherein the required set of documents includes a primary document and at least one supporting document.

40. A computer based system, as set forth in claim 32, wherein each document in the required set of documents includes a document name, a number of copies, and a simplex/duplex code.

41. A computer based system, as set forth in claim 32, including a remote documents computer application, wherein the finance computer application is adapted to send the list of finance documents to the remote documents computer application and the remote documents computer application is adapted to provide the required set of documents.

42. A computer program product for automatically creating a list of financing documents for a transaction, the computer program product, comprising:

computer readable program code means for receiving a request for a decision criteria document and preparing the decision criteria document, the decision criteria document having a plurality of data fields to be completed;

computer readable program means for receiving the decision criteria document and completing the data fields; and,

computer readable program means for receiving the completed data fields and to automatically select a required set of documents based on the completed data fields and preparing the list of financing documents.